MERCED

Conducting a Goal Setting Discussion

The Importance of Conducting Goal Setting

Supervisors and their direct reports need to collaborate in setting meaningful goals, tracking progress against those goals over time, and evaluating performance.

For the organization, goaldriven performance management aligns employees within an organization around achieving the strategic goals

Review Organizational Goals to Prepare for the Discussion

Before speaking with employees, supervisors should review the organization's top-level goals and how your own goals contribute to achieving the organizational goals. In addition, identify the goals that need to be delegated to the team, and provide direct reports with the information required to draft their goals.

You should advise the reports to complete the following steps to create a draft of their performance goals, strategies, and tactics before the goal-setting discussion.



- ✓ Re-read the mission and vision for the organization; understand the organization's strategic objectives and how their job supports them
- ✓ Re-read the department or school's mission and vision
- Review their job description and any performance expectations for their role
- ✓ Identify resources to complete goals: HR website, colleagues, UC Learning Center

- ✓ Review any development areas from recent performance reviews
- ✓ Review their current goals and aspirations
- √ Identify any new overarching goals
- ✓ Identify SMART goals
- √ Identify resources to complete goals

Organization
Division
Department/School
Unit/Team

Ensure Meaningful Goals Organization

You should work with your direct reports to check the accuracy of the goals and assess the alignment of goals with the university mission and departments/school objectives. In addition, you should ensure that the goals support the employees' development goals based on any recent performance feedback.

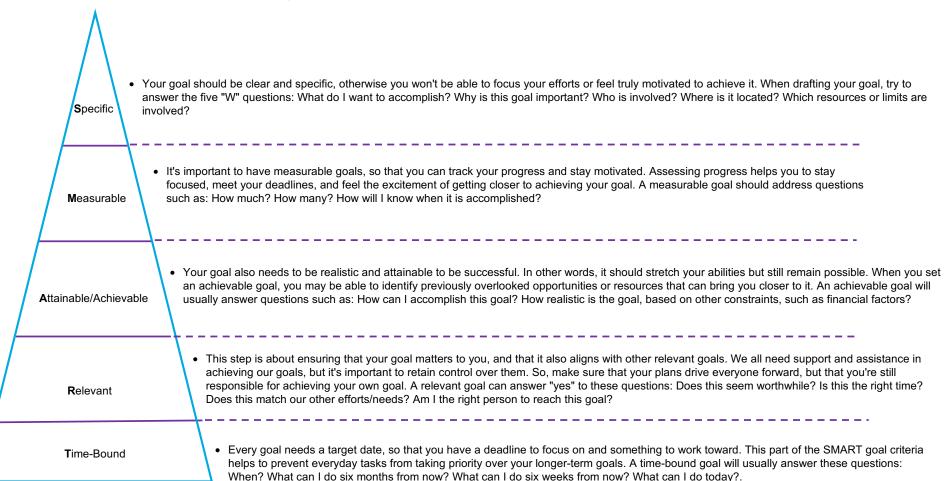


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Set SMART Goals for your Direct Report

Utilize the concept of SMART goals in the goal setting process; this method ensures that the employee and manager both understand the goal by creating a goal that is specific, measurable, attainable, relevant, and timely.



SMART Goals Example									
			Measurable	Achievable	Relevant				
			It's important to have	Your goal also needs to be	This step is about ensuring that				
		Specific	measurable goals, so	realistic and attainable to be	your goal matters to you, and				
		Your goal should be	that you can track	successful. In other words, it	that it also aligns with other				
		clear and specific,	your progress and stay	should stretch your abilities	relevant goals. We all need				
		otherwise you won't be	motivated. Assessing	but still remain possible.	support and assistance in	Time-bound			
		able to focus your	progress helps you to	When you set an achievable	achieving our goals, but it's	Every goal needs a target date, so			
		efforts or feel truly	stay focused, meet	goal, you may be able to	important to retain control over	that you have a deadline to focus on			
		motivated to achieve it.	your deadlines, and	identify previously	them. So, make sure that your	and something to work toward. This			
		When drafting your	feel the excitement of	overlooked opportunities or	plans drive everyone forward,	part of the SMART goal criteria helps			
		goal, try to answer the	getting closer to	resources that can bring you	but that you're still responsible	to prevent everyday tasks from			
		five "W" questions:	achieving your goal.	closer to it.	for achieving your own goal.	taking priority over your longer-term			
		What do I want to	A measurable goal	An achievable goal will	A relevant goal can answer "yes"	goals.			
		accomplish?	should address	usually answer questions	to these questions:	A time-bound goal will usually			
		Why is this goal	questions such as: • How much?	such as: • How can I accomplish this	Does this seem worthwhile? Is this the right time?	answer these questions: • When?			
		important? • Who is involved?			Does this match our other				
		Who is involved? Where is it located?	How many? How will I know	goal? • How realistic is the goal,	Does this match our other efforts/needs?	What can I do six months from now?			
		Which resources or	when it is	based on other constraints.	Am I the right person to reach	What can I do six weeks from now?			
	Goal	limits are involved?	accomplished?	such as financial factors?	this goal?	What can I do today?			
Organization Goal	Engage exceptional Staff		·			·			
	Provide high-quality and								
	cost-effective								
	administrative and								
	business services to the								
	campus; Create a vibrant,								
	sustainable and safe								
	environment for living,								
Division Goal	learning and working.								
	Optimize the performance								
Department/School	of our people to deliver								
Goal	the University's mission.								
	Construct a living, working								
	and learning innovation								
	hub; Engage with and								
	develop entrepreneurial in spirit staff members at UC								
Unit/Team Goal	Merced.								
only reall doal	merceu.		85% of my direct						
	Lead discussions to help		reports will write		Providing information on how				
	my staff understand		SMART goals for the		our team's work aligns with the	All one-on-one's and team			
	organizational goals, and		AY 2018-19	Prioritize SMART goals	organization's goals will increase	discussions will be scheduled for the			
	how our work contributes	Create open	performance appraisal	discussions during weekly	the efficiency and effectiveness	AY 2018-19 by the end of April;			
	to reaching those goals.	communication	cycle, with minimal	employee one-on-ones;	of our team and our	Funding request for coaching,			
	Provide direction and	pathways with my staff;	guidance; My direct	Schedule bi-weekly team	department/school. My team's	SMART goals, and group facilitation			
	resources for professional	Learn coaching skills;	reports will come to	discussions; Take a coaching	ability to write SMART goals	courses will be submitted by May			
	development. Employees	Learn group facilitation	me when they have a	course; Take a group	demonstrates our understanding	2018. Staff annual performance			
	development employees								
Individual Goal	will be able to write SMART goals.	skills; Learn SMART goals method	problem or need guidance.	facilitation course; Take a SMART goals method course	and support of the mission of the university.	appraisals will include SMART goals for the AY 2018-19.			

SMART Goals Template										
	Goal	Specific Your goal should be clear and specific, otherwise you won't be able to focus your efforts or feel truly motivated to achieve it. When drafting your goal, try to answer the five "W" questions: • What do I want to accomplish? • Why is this goal important? • Who is involved? • Where is it located? • Which resources or limits are involved?	Measurable It's important to have measurable goals, so that you can track your progress and stay motivated. Assessing progress helps you to stay focused, meet your deadlines, and feel the excitement of getting closer to achieving your goal. A measurable goal should address questions such as: How much? How many? How will I know when it is accomplished?	Achievable Your goal also needs to be realistic and attainable to be successful. In other words, it should stretch your abilities but still remain possible. When you set an achievable goal, you may be able to identify previously overlooked opportunities or resources that can bring you closer to it. An achievable goal will usually answer questions such as: • How can I accomplish this goal? • How realistic is the goal, based on other constraints, such as financial factors?	Relevant This step is about ensuring that your goal matters to you, and that it also aligns with other relevant goals. We all need support and assistance in achieving our goals, but it's important to retain control over them. So, make sure that your plans drive everyone forward, but that you're still responsible for achieving your own goal. A relevant goal can answer "yes" to these questions: • Does this seem worthwhile? • Is this the right time? • Does this match our other efforts/needs? • Am I the right person to reach this goal?	Time-bound Every goal needs a target date, so that you have a deadline to focus on and something to work toward. This part of the SMART goal criteria helps to prevent everyday tasks from taking priority over your longer-term goals. A time-bound goal will usually answer these questions: When? What can I do six months from now? What can I do six weeks from now? What can I do today?				
Organization Goal					· ·					
Division Goal										
Department/School Goal										
Unit/Team Goal										
Individual Goal										
SMART Goal:										